



# The IT Engagement Model

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Three Years Ago...

# Project Staggering

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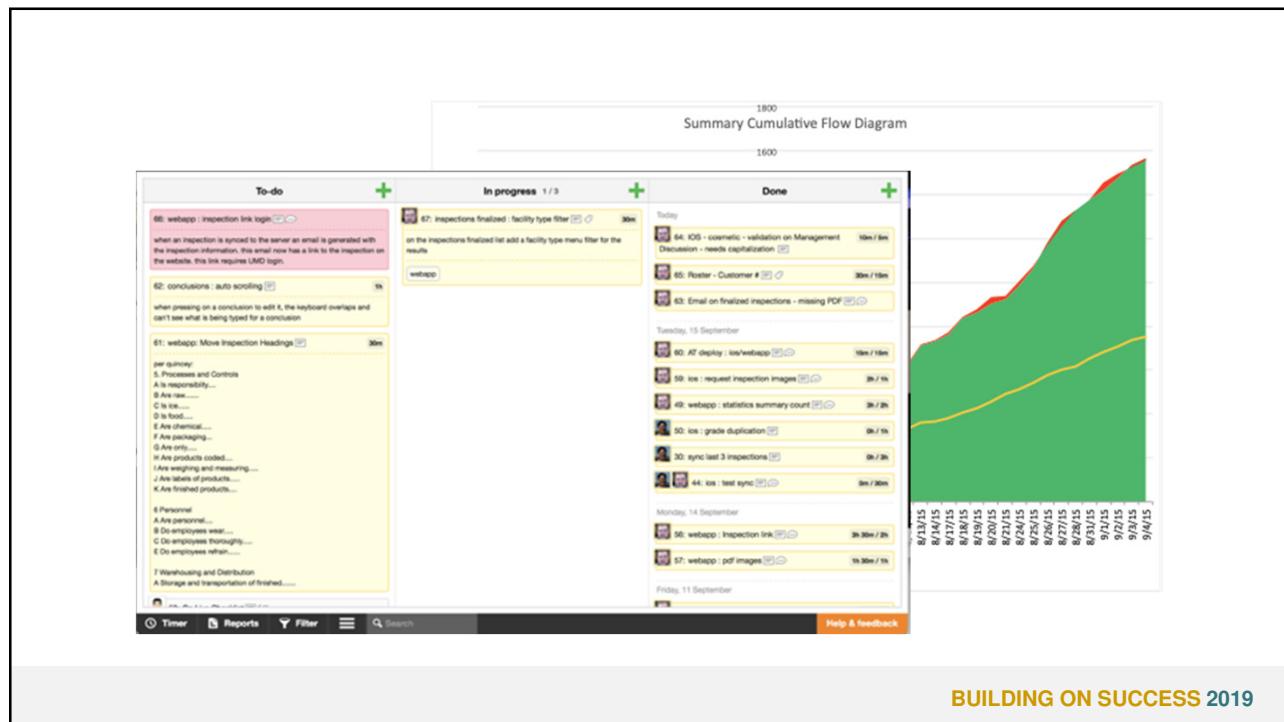
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# Limiting WIP

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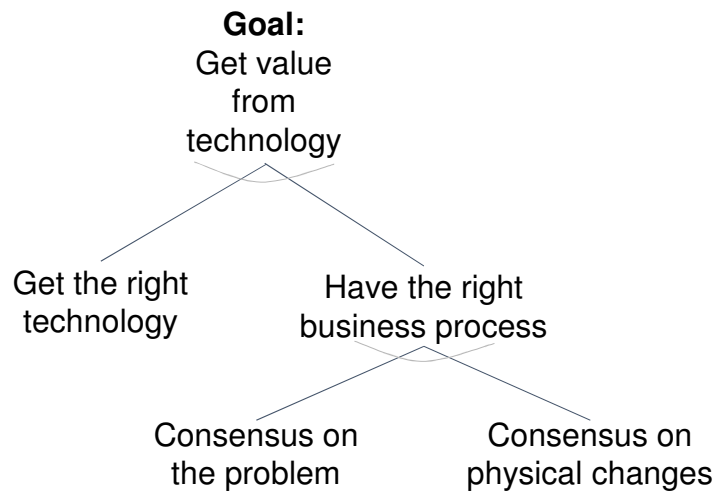
# Maximize Task Flow

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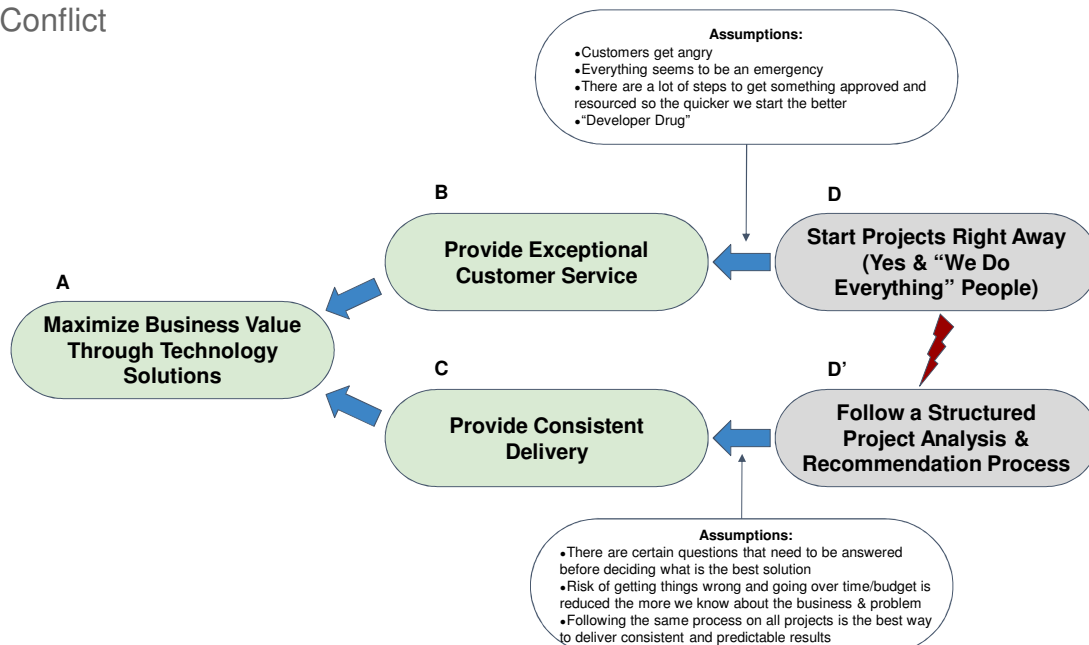
# So What?

# Business/IT Environment Background



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## IT's Conflict



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Can any solution maximize business value  
if we don't understand the true problem?

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How do a lot of the discussions go when we ask  
“what is the business problem”?

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- We want to adopt automation...this will increase control in our [work] and reduce the potential for errors
- COTS solutions for 3rd party [solutions] have client tools that provide much greater access to our customers than we can provide
- ...industry designed COTS systems have the functionality to not only address our current weaknesses, but also meet our wish list of future functions
- COTS solutions within this market are developed with [industry] concerns in mind and are designed for the [industry] professional's specific needs
- We need electronic signatures
- We need a portfolio management system

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Is the Problem Really the Lack of Something  
Else?

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## How does the Engagement Model define a problem?

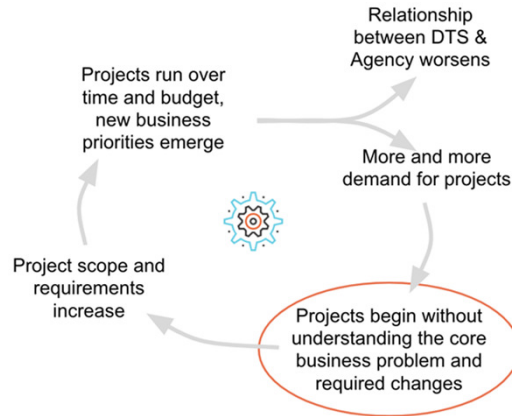
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- Can't comply quickly with change
- Many manual tasks
- Can't control document enough to meet requirements of legislature/statute/rule
- Big paper footprint
- Takes a long time to review documents (long time looking for errors)
- Difficult to track movement through the process
- Doesn't receive feedback on status quick enough
- Not receiving the information they need (specific reports/data)
- The amount of [throughput] is too low

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## What is the Relationship?

Problems/challenges/pain points have a relationship and that relationship can provide powerful insight



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## Triage Evaluation

- . Core Problem Analysis
- . Project Goal & Core vs Context
- . Pain Points
- . Conflict Cloud/Vicious Cycle
- . Project Sizing

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Can any technology solution maximize business value if the business process is deficient or unclear?

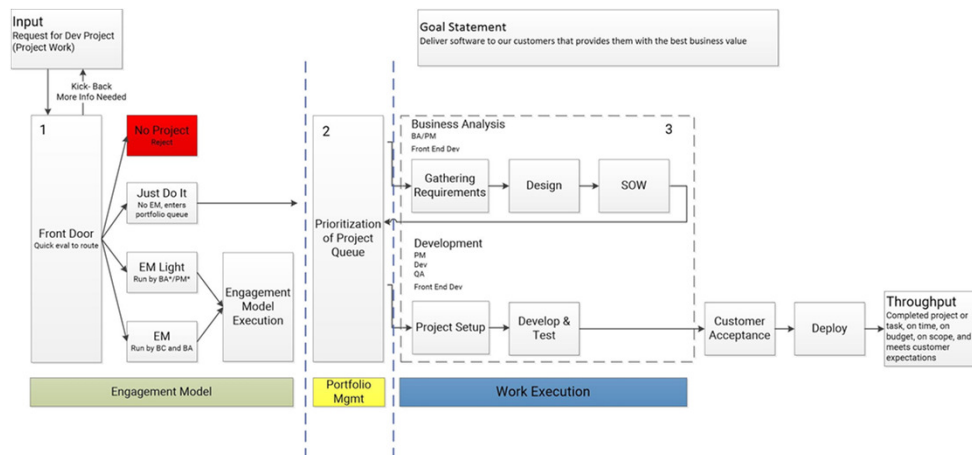
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## Business Needs

- For development to begin we need requirements, design, and agreement to begin
- Prioritization based on value
- Prioritization based on resource availability & level of effort
- A holding place for projects not ready to start yet
- Know project status and progress
- Know what is blocking projects
- Project requirements and expectations are clear within DTS & customer
- Customer understands how to engage and work with DTS
- Manage/handle change within the project
- Evaluate performance at all levels - i.e. quality/tasks/individuals/teams/systems
- For deployment we need approval by QA, rollback plan, approved change request
- Visibility into all streams of work (project/non-project)
- Maintenance agreement before maintenance begins
- Developers need to know their workload expectations
- Customer accepts the product by testing

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# Proposed Workflow



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## Business Performance Measures

### Project Portfolio

#### Front Door

- Total no. of requests made
- % made through standard process
- % of requests turned into projects
- % of requests from Engagement Model

#### Prioritization

- % of projects with a priority rank
- Total no. of projects currently in queue

#### Scheduling

- % of compliance to prioritization schedule

#### Full Kit

- % of compliance to full kit at move from queue to active status

#### WIP Control

- Total number of projects currently in progress
- % of projects over projected timeline
- % of compliance to initial scheduling
- Planned vs actual projects in WIP

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## Business Performance Measures

### Work Execution

#### Standard Process

- Number of exceptions to standard process by reasons

#### Prioritization

- % of tasks with a priority ranking
- # of tasks in the queue by type

#### Full Kit

- % of compliance to full kit at all identified FK points

#### WIP Control

- % of tasks in process plan vs actual (current & trend over time)
- % of tasks started by initial commitment
- % of tasks completed within initial commitment
- % of tasks released according to prioritization ranking
- % of developer time spent within each work type based on ideal ratio

#### Buffer Mgmt

- % of buffer consumed
- # of open issues
- % of meetings occurred
- # of issues resolved
- % of buffer consumed by type of work

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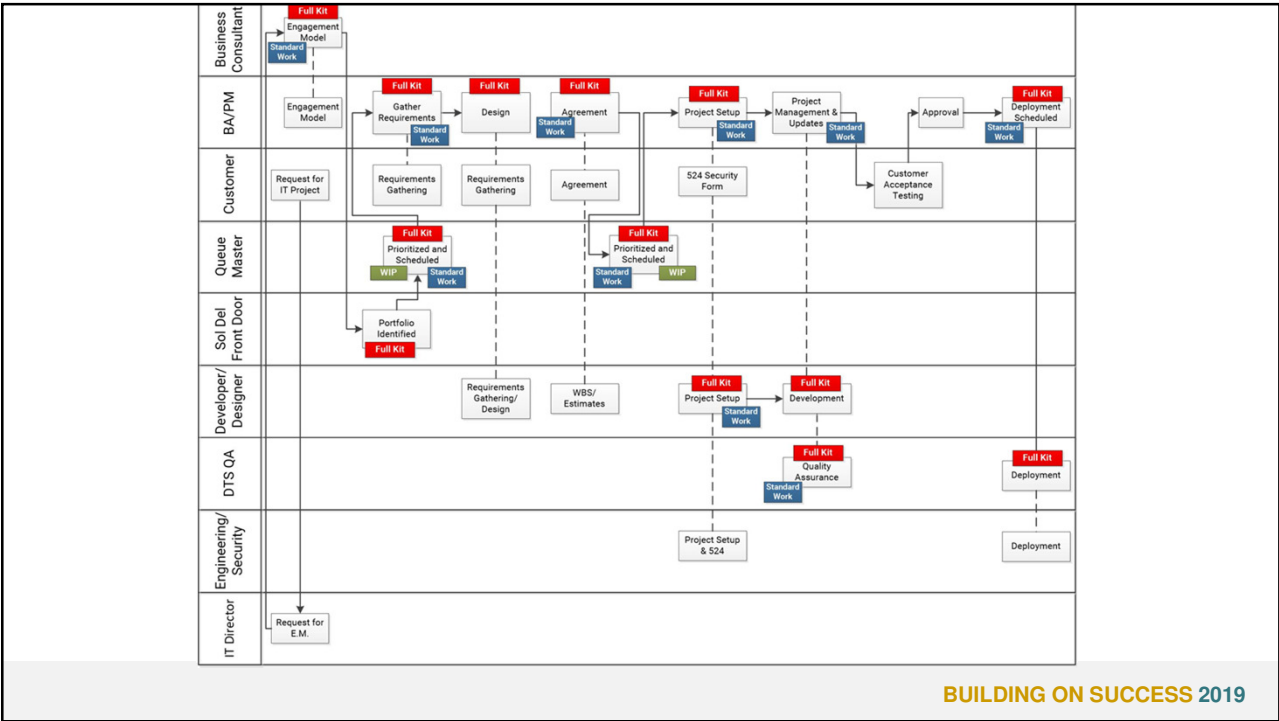
## Surface Evaluation

- . Solution Direction
- . Business Needs & Workflow
- . Change Matrix
- . Technical Direction Options
- . Business Performance Measures

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# More Detailed Process Documentation

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# Physical Changes

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Implementation Roadmap				
Step	Technical/Business	Physical Change Description	Timeline	Owner
1	Technical/Business	Implement a single front door on all projects	September 2019	Joseph/John
2	Business	Build all projects with user stories	September 2019	Kellie/John
3	Technical	Estimate through story points on all projects	September 2019	Master Engineers
	Business	Full kit - Solution direction alignment check and ready to move forward		Mgmt Team
4	Technical/Business	Determine initial velocity for all development skill levels	October 2019	Master Engineers
5	Business	Implement front door checkpoint/routing	October 2019	Joseph/John
6	Business	Implement the formalized queue to track and monitor scheduling	October 2019	John
7	Business	Implement the project prioritization on all projects	October 2019	John
8	Technical	Track and control WIP with WIP board	October 2019	John
	Business	Full kit - Solution direction alignment check and ready to move forward		Mgmt Team
9	Business	Implement a formalized BA process for all projects	November 2019	Kellie/John
10	Business	Implement buffer management discussions in stand up meetings	November 2019	Kellie/John
11	Business	Implement a formal and consistent process assessment meeting	November 2019	Mgmt Team
12	Business	Limit unplanned work to emergencies and bug fixes	November 2019	Mgmt Team

## Technical Evaluation

- . Implementation Roadmap
- . Detailed Workflow
- . Technical Solution Details
- . Updated Project Sizing

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## How can the EM help drive value through collaboration

Engagement Model



Best Value RFP



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